

# REPORT

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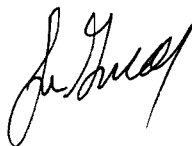
DATE: December 2, 2004

TO: Administration Committee and Regional Council

FROM: Heather Copp/ Chief Financial Officer  
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SUBJECT: Cost Recovery Policy

EXECUTIVE DIRECTOR'S APPROVAL:



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RECOMMENDED ACTION: Approve

**BACKGROUND:** From time to time, the Southern California Association of Governments (SCAG) is requested by various parties to provide data, enhanced data, planning, and programming services. Such requests often require additional data processing and analysis above and beyond statutory requirements. This policy will guide staff as it considers such requests and will ensure consistency.

Staff will be monitoring these requests to analyze the utilization of the program. Depending on the success of the program, future adjustments to the program may need to be made.

This policy will be shared with member jurisdictions and will be noted in the membership handbook.

**FISCAL IMPACT:** No additional cost at this time. As was mentioned above, this program will be monitored and reviewed for utilization and cost to SCAG. *HC*

## Cost Recovery Policy

### Background

From time to time, the Southern California Association of Governments (SCAG) is requested by various parties to provide data, enhanced data, planning, and programming services. Such requests often require additional data processing and analysis above and beyond statutory requirements. This policy will guide staff as it considers such requests and will ensure consistency.

### Purpose

The purpose of this policy is to establish guidelines on how SCAG staff can respond to request for services from various parties with the following objectives:

- Responsiveness to member jurisdictions
- Adequate resources for existing work plan projects
- Addressing concerns of SCAG's funding partners

### Policy

1. As part of SCAG membership, SCAG will offer routine services (20 hours of staff time or under per entity) to our member jurisdictions during each fiscal year. If a request is made by a non-member entity, e.g. consultant, who is doing work for the member, that request must be accompanied by a formal request from the member jurisdiction for which the consultant is working.
  - The request must be signed by the entity's executive director or planning director.
  - The Information Services Department (ISD) will track all requests.
  - When a request has been fulfilled the SCAG member agency will be notified of the work accomplished.
2. Services will not be provided to non-SCAG members, except in the case of other state or regional organizations, e.g. Metropolitan Water District. Procedures for routine and large requests as identified in paragraphs 1 and 4 apply. These requests would only be done upon review and approval by the ISD Director.
3. Beginning with the 2005/2006 OWP, a task will be established under various projects for "Coordination with local agencies for data and modeling". Actual time spent by SCAG staff performing these functions will be charged to those tasks in the OWP as well as fringe, indirect, and direct costs.
4. Any large requests from member jurisdictions would be required to be funded by the local agency making the request. These requests would have to be made at the time that the OWP is being prepared or during BA#1. This will allow staff time/ consultant time to be reprioritized to accommodate the work. These projects would be charged with actual SCAG labor, fringe, indirect, and direct costs.